

## Driving Congregational School Change to Enhance 21st Century Jewish Learning

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*For millions of American Jews, the words "Jewish education" most likely conjure images of days spent in synagogue classrooms decoding Hebrew, reciting prayers, learning holiday customs, and reading about biblical figures. This is the past, but (we hope) not the future of congregational education.<sup>1</sup> This form of part-time, mostly afterschool and/or weekend Jewish learning has been the most popular single setting for the Jewish education of Jewish children for many decades. More than 2,000 supplementary schools (most, though not all, of which are part of synagogues) are the main source of Jewish education for more than 230,000 Jewish children in North America (Wertheimer, 2008), making them "the largest 'network' operating in the arena of Jewish education" (Wertheimer, 2009a).<sup>2</sup> Despite its popularity, supplementary education has long been subject to often biting criticism as ineffectual or worse. In recent years, these critiques have sparked renewed*

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<sup>1</sup>For the purposes of this article, a congregational school is a Jewish religious school serving children in grades K-12 and that is directly affiliated with and supported by a temple or synagogue of any denomination (or that is unaffiliated). There are many other names for these afterschool Judaic learning programs (e.g., "Hebrew," "religious," or "supplementary" schools). Most recently, the nomenclature "complementary schools" has come to signify the range of settings that offer *part-time* Jewish education for students in grades K-12. This article focuses specifically on congregational schools.

<sup>2</sup>This may change as enrollments in all-day Jewish schools approach and may soon exceed those in supplementary programs. See *A Census of Jewish Day Schools in the United States, 2008–2009* (Schick, 2009). However, the growth in day schools today is being driven largely by Orthodox and, in many cases, Haredi enrollment. Among the non-Orthodox Jewish population, supplementary schools are likely to remain the predominant form of childhood Jewish education for many years to come.

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*efforts to improve and even transform congregational education. The breadth and scope of these efforts, encompassing hundreds of synagogues and dozens of communities, have made it more urgent that we understand the dynamics of congregational educational change: how it works and how to make it work better.*

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While the centrality of education to Jewish life has been a virtual constant throughout Jewish history, the forms that education has taken have evolved to respond to a succession of demographic and cultural changes. Frequently, Jewish education in America has followed trends in secular society; families choose different venues for their (and their children's) education and institutions often modify their programs in response to these demographic and cultural changes. Although it may seem that the congregational school as we know it today has been part of the fabric of Jewish life forever, it only grabbed a toehold in North America in the late 19th and early 20th centuries and has evolved in every decade since. For example, in response to increasing secularization, Germanization, and the influence of Protestant Christian Sunday schools in mid-19th century America, enrollment shifted from religious day schools to Sunday schools. In the early 20th century, Jewish schools relied heavily on teachers from Eastern Europe and, later, from Israel (Dushkin, 1980). In contrast, the *Educators in Jewish Schools Study* (EJSS) *Educator Survey* (Jewish Education Service of North America [JESNA], 2008b) demonstrated that more than 85% of the Jewish day and complementary school teachers who responded to the survey were raised in the United States.

The zenith for congregational schools was reached in the mid-20th century, as part the expansion and suburbanization of synagogues (Zeldin, 1983) fed by the Baby Boom and Jewish migration out of urban neighborhoods. Another aspect of the evolution of Jewish schooling was a change in the students who patronized these schools (Dushkin, 1980), from immigrant families and children to native-born American children. At the same time, a decline in anti-Semitism and restrictions that previously consigned Jews to "their own kind" in educational, professional, and social settings allowed Jews to participate more widely in the surrounding society. In many cases, what resulted was a weakening of the Jewish cultural capital available informally, through the home and neighborhood. As the synagogue took on a greater role as the setting for Jewish observance and education, the congregational school became the primary venue for educating Jewish children and the gateway to celebrating their entrance into "adulthood" via that quintessential American Jewish rite, the *bar* or *bat mitzvah*. By 1990, the Commission on Jewish Education in North America, among others, called the dilemma of increased assimilation and a less Jewishly-identified and Jewishly-interested population a "crisis," declaring: "The responsibility

for developing Jewish identity and instilling a commitment to Judaism for this population now rests primarily with education" (Commission on Jewish Education in North America, 1990).

One can debate whether synagogue schools in their heyday were successful in fulfilling the relatively modest role they were assigned within a community more concerned about "making it" in America than with the intensive Jewish education of their children. But, there can be little debate that as Jewish life in North America was transformed in the late 20th century, the inadequacies of the mid-century educational model became more apparent. The dramatic demographic, sociological, cultural, technological, and organizational changes that have taken place in Jewish and general society over the past quarter century call for equally dramatic changes in how Jewish education is organized, practiced, and delivered in 21st century North America to attract and to retain the participation of an increasingly diverse population.

These changes are essential to providing children and their families with educational experiences that are perceived as meaningful and satisfying and that motivate them to take seriously their Jewishness and their connections to the Jewish community and people.

Strengthening, improving, and/or transforming congregational education is central to this effort. The good news is that we have accumulated a substantial body of knowledge and experience in the domain of congregational school education and have built a rich enough literature about what is "effective" and "what works" to assert confidently ideas and strategies for making change. Efforts aimed at improvement and/or transformation have been supported by two principal lines of research: first to understand the characteristics of "good" congregational education and second to understand how to make the changes needed to become "good."

In *Schools That Work: What We Can Learn from Good Jewish Supplementary Schools* (Wertheimer, 2009a),<sup>3</sup> Wertheimer and his research team set out to identify key traits of effective supplementary schools through portraits of 10 "reasonably successful" schools differing in size, geographic location, and denominational affiliation. According to Wertheimer, good schools demonstrated four common characteristics. They (a) intentionally develop community among students, staff, and parents; (b) place an emphasis on taking Jewish study seriously; (c) understand the need to align all their efforts with school goals; and (d) primarily achieve discipline by attending closely to the needs of individual children. Based on these findings, Wertheimer proposed five key enabling factors for developing and maintaining a good supplementary/congregational school. These factors are (a) a clear vision, including both a vision of its ideal graduate and a plan for

<sup>3</sup>Full results of this extensive study are reported in *Learning and Community: Jewish Supplementary Schools in the Twenty-First Century* (Wertheimer, 2009b).

educating and forming such a student; (b) creating a culture of self-reflection aimed at recalibrating programs based on a critical examination of what is and isn't working; (c) making the most of resources (e.g., drawing on wider community for expertise and grants); (d) developing a common purpose with lay leaders and parents; and (e) a staff imbued with a strong Jewish mission.

Wertheimer presents a well-articulated synthesis of what has emerged in recent years as a broad consensus among researchers about the characteristics of "good" synagogue-based schools (Wertheimer, 2009a).<sup>4</sup> In and of itself, however, this research does not tell us how to get from "here" to "there." What can we do in a deliberate and proactive way to help move more synagogues and their schools closer to the "ideal?" Here enters the second line of research on congregational educational change.

In the discussion that follows, we refer to "congregational educational change." This broad designation encompasses a range of initiatives that seek to enhance the quality and effectiveness of the Jewish learning that takes place under synagogue auspices. Very often, the synagogue's "school" is at the core of these efforts, either as the focal point for change or as the precipitating cause for the change effort. However, many current efforts are premised on the idea that one cannot change the "school" without addressing the larger issue of learning in the congregation as a whole or the idea that only by organizing learning for children in a framework that is not a conventional "school" (e.g., a family learning experience) can a congregation achieve the desired impact on learning. We therefore use broader terms, rather than speaking more narrowly about "school change," to reflect the variety of strategies and approaches.

Over the past two decades, numerous local and national initiatives have been launched to change congregational and other supplementary schools. Some have been operating for well over a decade, while others are currently in pilot phases. These change efforts involve schools, congregations, local communities, and national networks. They define their goals as encompassing one or more of three levels of change: individual change (strengthening Jewish identity and affecting the lives of learners), school change (improving a specific educational framework/process), and institutional change (strengthening the synagogue broadly as a center of Jewish learning and living). The initiatives are both denominationally-based and cross-denominational.

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<sup>4</sup>Research on this topic goes back at least several decades and includes several noteworthy studies, including: *Supplementary School Education* (Holtz, 1993); *Succeeding at Jewish Education* (Reimer, 1997); and portraits growing out of the work of the Experiment in Congregational Education. It also includes more than a half dozen syntheses and original research reports published by JESNA (see "References" for a complete listing).

In recent years, JESNA has been in a unique position to observe and assess many of these change initiatives at the individual congregational, local, and national levels. JESNA's Berman Center for Research and Evaluation has conducted evaluations of a number of these initiatives. JESNA's Learnings and Consultation Center has worked closely with several community and national projects and compiled information about many more; its Lippman Kanfer Institute has interviewed and elicited learnings from leaders of many of these change efforts. What follows is a distillation of some of the lessons that emanate from this multi-pronged engagement with the work of congregational educational change, set against the backdrop of literature on educational and organizational change in both the Jewish and general worlds.

The sections that follow are based on a number of JESNA publications and on unpublished material gathered in the course of preparing these publications. A significant portion of this unpublished material is derived from evaluations of educational and communal service sector programs conducted by JESNA's Berman Center. These evaluations were commissioned by national and local funders, program providers, central agencies for Jewish education, and federations. The specific details of these evaluations and their findings are proprietary to the organizations that contracted with JESNA to perform them; JESNA honors this confidentiality. Nevertheless, it is important to note that the majority of these evaluations were built on integrated data collection methodologies that combined quantitative and qualitative research approaches and instruments (e.g., surveys, interviews, focus groups, observation, document review, etc.) to answer unique primary research questions co-developed by the client and the Berman Center. The goal of these evaluations, whether implementation- or impact-focused, was to provide utilization-based data to inform the client's decision-making processes at any point in the life of its program(s). Because the studies were custom-built to meet the needs of the clients and their target audiences, it is not possible to perform statistical comparisons across studies. Nevertheless, each study stands independently and contributes significant learning about congregational educational change specifically and the trends and direction of Jewish education more broadly. The evaluation projects from which the authors drew evidence for this article include: Building Leadership Capacity for Educational Excellence & Congregational Transformation, Project Curriculum Renewal and the Moreshet Initiative (Jewish Education Center of Cleveland); Center for Excellence in Jewish Teaching (UJA of Northern New Jersey); the CHAI Curriculum Initiative (URJ); the Jewish Educator Corps (JEC); Kehilliyot Da'at (Knowledge Communities); L'Atid: Synagogues for the Future (Jewish Federation of Greater Hartford); Leadership Institute for Congregational School Principals (JTS/HUC-JIR); Mashkon Pilot Projects (Partnership for Jewish Life and Learning); and Nurturing Excellence in Synagogue Schools (NESS) (ACAJE/JOP).

Additional material for this article comes from research conducted by the Lippman Kanfer Institute (2008) for its working paper, *Transforming Congregational Education: Lessons Learned and Questions for the Future*. The primary research includes interviews conducted in spring, 2008, with the professional leaders of 11 synagogue and/or congregational education change initiatives: ECE, NESS, Synagogue 2000/3000, the Legacy Heritage Innovation Project, Synaplex/STAR, La'atid: Synagogues for the Future, Chai/URJ, Framework for Excellence/Etgar/USCJ, Next Generation/Jewish Reconstructionist, PELIE, and the Institute for Southern Jewish Life Jewish Education Program. Secondary sources include published and unpublished materials dealing with and provided by these initiatives (e.g., flyers, articles, and papers prepared by project leaders; speeches and presentations; materials from conferences and workshops; descriptions and materials on program websites; etc.) and self-assessments and external evaluation reports for five Jewish synagogue/congregational school change initiatives: La'atid, Re-Imagine, Synaplex, Chai, and NESS.

#### ENVISIONING THE CHANGE YOU WANT: VISION DRIVES CHANGE

Perhaps no word comes up as frequently in discussions of change as "vision." As Daniel Pekarsky (2008) argues, without a vision that is at once "existential" (one that defines the type of person we wish to cultivate) and "educational" or "institutional" (one that joins the existential vision to an approach to actualize that vision within a specific context), even the most sincere change efforts will amount to little more than rearranging the furniture. Theorists and practitioners in both general and Jewish education settings have made a strong case that all profound change takes place in service of a vision: a vivid picture of what an institute seeks to be or what it is at its very best. Vision drives educational change by inspiring stakeholders (e.g., professional and lay leaders in the congregation, parents, teachers, and students) and by establishing a reference point for critical decision-making. A vision must be more than a pretty picture to have an impact. As Daniel Marom writes, "The ideas of vision must guide, infuse, animate, and energize practice" (Marom, 2008). A well-articulated vision of what an excellent congregational school looks like will guide the practice of leaders and stakeholders as they confront the myriad issues involved in running an educational program on a daily basis.

Aron, Lee, and Weinberg (2002) illustrate how developing and keeping a vision at the center of one's attention is critical to ensuring that change is an intentional process, not simply a product of grabbing onto the latest attractive idea or innovation. They suggest that when congregations look at

alternative models for their educational programs, they need to ask a series of questions that move from vision to practice:

- What is our vision of congregational learning, and what role should the religious school play in that vision?
- How can we adapt elements of the alternative models to fit this vision and respond to our congregation's needs?
- How can our congregation support the new model to increase its chances for success?

Under day-to-day pressure, visioning may seem like a luxury and the results of a visioning process may be given lip-service at best, or quickly forgotten. For this reason, a vision needs champions: individuals who understand and who are committed to it. Such visionary leaders can emerge from anywhere in the community—the rabbi, the education director, and lay leaders can all be vision champions. The visionary leader must believe deeply in the vision, communicate it effectively, galvanize support for it, and continually re-present the vision in positive, aspirational, and realistic terms. JESNA's evaluations of congregational and educational change efforts have shown that the support and initiative of a strong rabbi and/or education director who are perceived as visionary leaders can have a significant, positive impact on the change initiative and increase the likelihood that the initiative will succeed.

But being an individual visionary is insufficient to catalyze and to root change successfully. The primary challenge that leaders face is forging a shared vision among key stakeholders. Peter Senge of MIT's Sloan School of Management says that developing a shared vision is a "collective discipline that establishes a focus on a mutual purpose" (Senge, 1999, p. 32). He writes, "When a group of people come to share a vision for an organization, each person sees an individual picture of the organization at its best. Each shares responsibility for the whole, not just for one piece" (Senge, n.d., ¶ 11). More than speaking a common language, a truly shared vision unites a community behind the educational change they seek and the principles and practices that will help them reach that future.

JESNA's evaluations have revealed that the most successful institutional and educational change initiatives intentionally build such a shared vision. They accomplish this by securing early buy-in from stakeholders, sharing appropriate project information and materials with all key players, and using the congregation's available communications vehicles (e.g., newsletter, website, open forums, rabbi's *divrei* Torah, etc.) to develop shared language and common commitment to change. The visionary leaders in these communities have discovered that a shared vision grows more fruitfully toward realization when leadership and responsibility can be distributed among a broader group of volunteers within the congregation. In this way, a shared

vision becomes a shared reality that the stakeholders and other key partners believe they can achieve together.

Even with the best intentions, careful reflection and planning, and strong leadership, vision-driven change likely will meet resistance. This resistance can take many forms: a clear and strong defense of the status quo, a gut-level anxiety about the unknown, or just a subtle sense of disquiet that the new vision could displace cherished traditions. Rather than fighting back, the visionary leader and other supporters of vision-driven change can see such resistance as part of the "creative tension" that accompanies change. Creative tension, says Senge, "comes from seeing clearly where we want to be, our 'vision,' and telling the truth about where we are, our 'current reality.'" The gap between the two generates a natural tension" (Senge, n.d., ¶ 4). He advises that individuals and institutions should "learn how to work with creative tension and learn how to use its energy to move reality more reliably toward their visions" (Senge, n.d., ¶ 9). Approaching vision-driven educational change in congregational schools requires a community dedicated to learning and reflecting together.

### Change Is About Learning

While it may be true that "the un-aimed arrow never misses," effective and lasting change in congregational education requires more than just a clear vision. Because enduring change requires a combination of practical steps and deeper cultural, perhaps structural transformation, the change process is powered by and largely about learning (Lippman Kanfer Institute, 2008). In *The Fifth Discipline*, Senge (1994) introduced the notion of the learning organization: a dynamic system that is in a state of continuous adaptation and improvement. He posits that organizations must be flexible, adaptive, and productive to succeed in change. To do so, he argues, organizations must "discover how to tap people's commitment and capacity to learn at *all* levels." He identifies five basic disciplines or "component technologies" that characterize learning organizations and differentiate them from more traditional organizations: systems thinking, personal mastery, mental models, building shared vision, and team learning.

That learning is critical to change is also a central theme in the work of Michael Fullan, perhaps the most prolific and widely cited analyst of educational change efforts today. Fullan places great emphasis on "capacity-building"—increasing the efficacy of educators to improve student learning—as the engine of successful change. Like Senge, Fullan insists that this must be both an individual and a collective process. "Learning in context and learning every day are the keys. Capacity-building experiences develop skills, clarity . . . and motivation. Since these are generated collectively, that is, shared by the group, they become potent new forces for breakthrough improvement" (Fullan, 2007, p. 58).



This type of organizational learning also is central to congregational educational change. In her pioneering work spearheading and documenting the Experiment in Congregational Education, Isa Aron has focused attention on this dimension of the change process, particularly in her book, *The Self-Renewing Congregation* (Aron, 2002). While individuals (teachers, educational directors, lay leaders, and clergy) must develop and/or strengthen their capabilities as educators and leaders, they also must be part of a shared process of learning that transcends the growth in knowledge and skills of any single participant and changes the institution as a whole.

Learning cannot take place without experimentation and openness to new possibilities. This does not mean, however, that everything is put up for grabs simultaneously. Rather, readiness for change rests on a delicate balance of dissatisfaction with the current situation and a baseline of stability from which to venture forth into new territory (Aron & Zeldin, 1996). In synagogues especially, change must be rooted in a sense of continuity and tradition, while also being focused on the future. This means that each congregation will move at a different pace, reflecting different strengths and needs. Moreover, in keeping with the idea that learning is at the heart of change, the process is never finished. Congregations need to maintain the flexibility to accommodate change processes that are, as Aron and Zeldin observe, "both planful and emergent."

As important as the discipline of ongoing organizational learning is to successful change, evidence from JESNA's evaluations and its detailed review of extant literature indicates there is a second key dimension of learning essential to the change process in congregational education: Jewish learning. While enhanced, enriched, and expanded Jewish learning is a clear *goal* of congregational educational change, experience has demonstrated that it is also a powerful vehicle driving the *process* of change. Building Jewish learning into the process sets a cultural tone, reminds participants what the initiative is about, models the ideal outcome, and builds community.

As with organizational learning, there is a personal and a collective aspect to Jewish learning. One of the striking findings in some of the research on congregational educational change is that it is a process of personal growth and transformation for many participants. The Jewish learning incorporated in the process is often the key to this outcome. The more that meaningful Jewish learning is part of the process, the more likely that meaningful Jewish learning will permeate the synagogue as the process takes hold.

### Types of Change

To this point, we have spoken about "change" as if it were a unitary concept; it is not. There is "change" and there is "change," and the efforts underway in the area of congregational educational change reflect different types of

desired change. Synagogues entering into these processes should be clear about the type(s) of change they will pursue—though this may, and perhaps should, evolve as the process unfolds.

Robert J. Marshak (1993) of American University has identified four main types of change. These are: remedial change (correcting/fixing something perceived as broken); developmental change (building, adding to, or improving what exists); transitional change (moving from one way of *doing* to another behavior/approach); and transformational change (moving from one state of *being* to another). The goal of transformational change is to “liberate and recreate.” Larry Cuban (1988), Professor of Education at Stanford University, gets at a similar distinction by identifying two forms of educational change. “First order,” or incremental change, aims to correct defects in policies and practices to enhance an existing system (e.g., to be more effective and efficient) without changing basic organizational goals and structures (corresponding roughly to Marshak’s first two categories). “Second order,” or fundamental change, alters the essential ways in which organizations are structured and questions assumptions, rules, purposes, and forms that seem taken for granted (closest to Marshak’s transformational change).

Congregational educational change endeavors operating today embody nearly all of these types of change. These change processes may include a variety of activities: visioning and goal setting, curricular reform, introducing new congregational programming, enhancing the quality of teaching, professional and lay leadership development, and changing the culture of schools and synagogues. Although any one of these *can* be a catalyst for more far-reaching second order change, in practice some, like curricular changes or adding new programs, seem to produce primarily incremental, first order changes. If fundamental, transformational, or second order change is a goal, a key question is whether and how it is possible to get there through incremental changes alone. Partly for this reason, congregational educational change initiatives appear increasingly to be embracing explicitly systemic approaches to change that encompass multiple dimensions of activity, including those (like visioning and structural or cultural change) that lend themselves best to achieving potentially transformational outcomes.

When considering the idea of “transformational outcomes” for congregational educational change, professionals at all levels across the field conceptualize markers of “success” in light of their particular circumstances—including, but not limited to their physical environment, available financial and human resources, educational vision and capacity, professional and lay leadership support/involvement, and student/parent community. Despite these differences, JESNA asserts that it is possible to articulate a range of desired outcomes. The basic premise behind constructing desired outcomes is that one primary goal of Jewish congregational school education is “to engage greater numbers of children and families in

satisfying and impactful complementary Jewish educational experiences by enhancing what exists and developing a broad range of program options in local communities, using both traditional and non-traditional approaches" (JESNA, 2010). One example of partners in the field breaking this overarching goal into discrete, measureable outcomes is The WOW Project, a collaborative initiative spearheaded by JESNA and the Association of Directors of Central Agencies of Jewish Education (ADCA). As an exemplar of an outcomes-driven process of congregational school change, The WOW Project model posits three outcomes and products that the program will achieve in participating communities within 10 years. These are significant increases in:

1. the percentage of eligible individuals receiving complementary Jewish education (an increase of at least 20% in each participating community);
2. participants' (students and parents) satisfaction with the complementary Jewish education they receive (as measured by continuation past *b'nai mitzvah* and surveys of student and parental attitudes); and
3. the impact of complementary Jewish education on participants in terms of what they know/feel/do (as measured by engagement in a range of Jewish activities and appropriate performance assessments geared toward individual program goals).

As a model of congregational educational change operating in the field today, The WOW Project understands that to achieve these outcomes, it will be necessary to realize the following results (or "indicators of success") on the community level:

- The community will recognize the benefit of systemic, collaborative planning.
- The community will develop a shared vision for what a system of quality complementary educational opportunities should look like.
- The community will use data to inform planning and implementation of programs.
- Central agency staff will demonstrate greater capacities to catalyze and support change and improvement in complementary Jewish education will be strengthened.
- Consumers will use information about high-quality complementary Jewish education options to make better personal choices for themselves and their families.
- There will be a wider range of effective programs available, as evidenced through systematic evaluation.
- Individuals will be able to move more easily among options, resulting in more intensive and enduring educational "journeys."

The evidence seems to indicate that such systemic change processes generate the most successful and enduring change (Fullan, 2000). In a systemic approach to change, vision, action, reflection, and conversation feed off one another to drive the process. Combining these elements is the key to a successful change process. At its best, this becomes a spiraling process of continuous learning and growth. In practice, there are differences in how these principles are implemented. Even initiatives that aim to promote "systemic" change start in different places and employ different tools. Some begin with broad visioning and move to experiments (we might call this a "deductive" approach). Some begin with action projects and try to use these to generate deeper reflection about larger issues (a more "inductive" strategy). Some tackle multiple dimensions of the change process almost simultaneously; others address them sequentially. Some provide highly explicit processes for synagogues to follow; others are looser. Some emphasize bringing participating congregations together to share ideas and build a sense of community; others focus more resources on intensive consultation within individual congregations.

We do not know yet how these different strategic choices affect the success (or lack thereof) of these change initiatives. The "technology" of systemic change is far from being perfected, but it is noteworthy that a growing number of initiatives overall are at least aiming at transformative change and experimenting with approaches to achieve it. This does not imply that remedial, developmental, or transitional change is without value. For many synagogues, this may be necessary before they can contemplate second order changes; certainly it has the potential to improve the current educational experience of learners. Nevertheless, as the field's analyses of supplementary schooling have grown more sophisticated and pointed, it seems desirable (even inevitable) that synagogues and communities will aim higher regardless of the particular strategies they employ for achieving transformational change.

### Elements of Change

Change is complex, challenging, and nonlinear. Part of the process of better developing the technology for far-reaching change involves understanding how the change process unfolds. Remembering that there is no simple formula, what are key elements in a successful change process? In his 1996 book, *Leading Change*, Harvard Business School professor John P. Kotter posits eight stages needed to effect major change within an organization. Kotter's change management process, based on his study of successful and failed change initiatives, consists of the following steps:

1. Establish a sense of urgency
2. Create a guiding coalition
3. Develop a vision and strategy

4. Communicate the change vision
5. Empower action
6. Generate short-term wins
7. Consolidate gains and produce more change
8. Anchor new approaches in the culture (Kotter, 1996)

Kotter's outline conforms closely to a number of the models that are being employed in Jewish contexts today. Perhaps the greatest value in Kotter's work is in identifying the many ways in which change efforts can founder. Failure in any number of key tasks (e.g., building a strong coalition to lead change, getting some quick wins to build momentum, communicating with stakeholders what is going on and why it matters, sustaining momentum after the initial flush of success, etc.) will undermine a change process, no matter how strong the vision or how powerful the motivation. JESNA's experience in the field demonstrates that these tasks are challenging for most synagogues, especially given their limited resources, both human and financial, which is why many change initiatives proceed in fits and starts.

One critical requisite is getting the change process off to a solid start. Three "first steps" seem to set the stage for success: (a) engaging in visioning with lay leaders, (b) undertaking community-building (to generate buy-in and consensus among all stakeholders), and (c) strengthening collaboration among professionals. These steps may take place sequentially or simultaneously, but without them a congregation will have difficulty passing "go" on its journey toward educational change.

### Blessed Are the Change-Makers

Successful, enduring change cannot be achieved without the commitment, guidance, and support of "change agents": individuals who drive the process forward and who assume responsibility for facilitating and overseeing the progress of the effort. In synagogue settings, the change agent role often falls to a formal leader within the congregation. When this is the case, these leaders must be able to inspire others, even as they are inspired by them (Aron & Zeldin, 1996).

Leadership for change is most effective when it is collective. Getting the right people engaged and empowering them is critical. Often, this entails bringing a broad-based group of leaders together to plan and making sure they are listening and responding to the community. Identifying and cultivating change agents (the "Nachshons")<sup>5</sup> is an ongoing challenge.

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<sup>5</sup>According to the rabbis' Midrash on Exodus (*Shemot Rabbah*), Nachshon ben Aminadav initiated the crossing of the Reed Sea by walking in until the waters nearly covered him and the Sea split. To be a "Nachshon" is a culturally Jewish term used both in Hebrew and Yiddish meaning to be an innovator or initiator.

New leadership needs to emerge and be brought on board along the way, since burnout is a perpetual problem. The goal should be to move participants in the change effort to higher levels of engagement throughout the process.

Marshak (1993) provides metaphorical descriptors of the varying roles of change agents within different types of change processes. Within initiatives aimed at remedial change, the change agent functions as a repair person, mechanic, or maintenance worker. Developmental change efforts require a trainer, coach, or developer. Transitional change needs a planner, guide, or explorer. Transformational change demands a liberator, visionary, or creator. In fact, most change initiatives include elements of all of these types of change. Even change endeavors that aim at "transformation" frequently include elements of repair, improvement, and transition. Therefore, change agents will wear many hats depending on the focus of the effort at a given point. This is another reason why collective and collaborative leadership is an asset: it draws on a wider range of skills and talents and it allows individuals to play different and complementary roles in the change process.

In addition to the individual(s) leading the change effort, it is important to secure the buy-in of other key stakeholders, including those with formal responsibilities (e.g., members of the school or education committee) and congregational leaders not directly involved in the process or with the school. The greater these leaders' understanding of the educational issues facing the school and the congregation, and the greater their familiarity with the educational program, the more effectively they will perform their roles within the educational change process and the broader congregational context. Equally important, this engagement and familiarity is likely to produce greater support among key decision-makers for the financial implications of the change initiative. (Change almost invariably demands additional resources.) More than any other single factor, fostering this collaborative environment of support within a synagogue depends on the rabbi. As Koren and Sales (2006) note, major change in congregational education cannot occur without the clergy's active support.

Another key learning from evaluations of recent change initiatives conducted by JESNA and others is the importance of external change facilitators. Outside consultants can contribute to change initiatives by facilitating the process and by providing knowledge and insight. In cases of successful congregational educational change, external change agents frequently brought assets/skills that complemented a congregation's internal resources. They were able to keep the big picture in mind as they helped congregations manage the change process. Sometimes these consultants even served as mediators in times of conflict. In many cases evaluated by JESNA's Berman Center, consultants' ability to help the congregation's leadership express their concerns and work through "turf issues" was critical to assisting the congregation in building a collaborative community.

Consultants, facilitators, mentors, and evaluators can provide invaluable guidance and support for many aspects of the change process. They can fill a need for skill sets that may not be available within the congregation, including high-level knowledge and expertise in education and/or organizational development, familiarity with and expertise in complementary school settings, and consulting and coaching skills. JESNA's research and field experience demonstrate that knowledge of particular congregations and the field of Jewish education increased consultants' authority and credibility among key stakeholders. Consultants and mentors should be an active, but not overbearing, presence. They need to work as a team with internal and other external players (e.g., a local central agency for Jewish education). The most effective outside support supplies perspective that insiders find difficult to attain and helps build the synagogue's internal capacity. In some cases, ongoing maintenance will be essential for cultural change to occur. Without some modicum of continued support, the change process may lose energy or even reverse itself. Nonetheless, consultants and coaches must also take steps to "wean" congregations from dependence on their full support so that they are able to assume more of the responsibility for continuing the change process.

Given this need for sophisticated external support, organizations such as central agencies, denominational movements, and academic institutions clearly have roles to play in promoting and supporting educational change in congregational schools. They can help anticipate and identify necessary changes; create a climate supportive of change in the community (e.g., through advocacy); set standards and/or help institutions set standards; offer incentives and rewards for innovative or exemplary efforts; facilitate visioning; provide resources (financial, human, informational, and material), technical assistance, and training; contribute their perspectives and experiences with other change processes (within and outside the Jewish world); facilitate networking among institutions and leaders; partner with local institutions to model change; and conduct evaluations and provide constructive feedback.

### Factors Promoting and Enhancing Change

Everything we have said thus far points to the importance of relationship-building to the change process. Strong relationships among professionals and lay leaders in the congregation provide fertile ground for developing a shared vision. Relationships also create a sense of shared responsibility (collectivity) and expand the opportunities and motivation for sharing information, technical expertise, and social-emotional support during the inherent disequilibrium of the change process.

Strengthened relationships and enhanced collaboration are both critical parts of the process and outcomes in the work of organizational change.

Cultivating a collaborative environment is an effective way to recruit and re-energize lay people. As noted previously, lay leaders who feel greater commitment are more likely to support and attend to the needs of the change process, to serve as a "more cohesive leadership dedicated to educational change" (Cohen & Lynn-Sachs, 2005). Forging strong relationships requires open and transparent communications among program staff, lay and professional congregational leadership, and external change agents. Communication gaps often lead to dissatisfaction with the change process and a sense of a lack of progress. For this reason, change leaders should err on the side of "over-communicating," using multiple forms of communication and information exchange.

This focus on the centrality of relationships reminds us that all change processes are essentially human processes. The same dynamics that govern interpersonal relationships in daily life are operative within institutions. Michael Hammer, famous for his work on "re-engineering" business processes, asserts that successful change is based on several key human characteristics: humility, tolerance for risk, commitment, a bias for action, and trust (Hammer & Champy, 2006). Understanding congregational educational change as a "human" process and not a mechanistic one is especially important in light of the "loosely coupled"<sup>6</sup> nature of synagogues as organizational systems. Susan Shevitz (2008) has explored how to make change successfully in loosely coupled systems, or "organized anarchies," that are characterized by problematic goals (inconsistent, ill-defined), unclear technology (trial and error), and fluid participation. She suggests six actions that may enhance and promote change within these systems: (a) build commitment to the institution and to the beliefs and values that bind it together, (b) recognize the limits of intended change, (c) envision the whole and cultivate "systems literacy," (d) attend to the ritual components of change, (e) define the new group process, and (f) cultivate symbolic (cultural) leadership. Shevitz's emphasis here reinforces the need to go beyond attention to structures and programs in the change process. Change is about people, their needs, concerns, aspirations, and convictions. The change process must attend to these and also serve as a source of meaning for participants.

Change is a human process in another sense. Successful implementation of any change effort depends on the knowledge, skills, and attitudes of the individuals who must make it work. In Jewish and general education, the failure of change initiatives due to the inability or unwillingness

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<sup>6</sup>See *Leading and Planning in Loosely Coupled Systems* (Hirschhorn, 1994). Hirschhorn writes that loosely coupled systems "are settings where individual elements have high autonomy relative to the larger system that they are in, often having a federated character. In loosely coupled systems, actions in one part of the system can have little or no effect in another or can unpredictably trigger responses out of proportion to the stimulus. The linkages among elements are often unpredictable, ill-understood, and/or uneven" (p. 1).



of those on the front lines to do what is being asked of them is an all-too-familiar story. The challenge is especially great when the change envisioned involves far-reaching structural and cultural changes guided by an ambitious vision that demands a range of new practices. A successful congregational educational change initiative relies on the performance of many players in the process, but especially on those engaging directly with the learners. Richard J. Murnane and Frank Levy (1996) have identified five principles to improve the performance of those who must implement change on the front lines: (a) ensure that all frontline workers understand the problem, (b) design tasks so that all frontline workers have both incentives and opportunities to contribute to solutions, (c) provide all frontline workers with the training needed to pursue solutions effectively, (d) measure progress on a regular basis, and (e) persevere and learn from mistakes. Evaluations and original research in the field of congregational educational change initiatives conducted by JESNA and other researchers confirm that involving teachers and providing them with extensive support via professional development are key factors in whether changes "stick" or not.

It is not only frontline personnel who make a difference in whether change takes root and endures. Successful congregational educational change also relies upon an "integrated approach to Jewish learning and living that permeates the entire institution and is understood and subscribed to by all levels of leadership" (Berger & Flexner, 2000, p. 12). This returns us to the centrality of learning as a core element in the change process. Learning takes place on multiple levels throughout successful change initiatives: there is learning about Jewish education, the congregation, leadership, process, people, and the relevance of Jewish texts. Jewish learning models the desired outcomes, helps participants to grow Jewishly (and feel the satisfaction of doing so), and anchors conversations in Jewish values. This learning should be structured, deliberate, and collaborative.

Finally, we cannot ignore that financial resources can help "lubricate" change. All change requires resources. New funding, whether internally or externally generated, certainly can help to smooth the pathways to change. One challenge common to congregational change initiatives, and all educational change initiatives, is ensuring that new funds help to create the infrastructure for sustainable change, not just new short-term programs. Additional financial support also may be required to secure external resources and to help them fulfill their functions in facilitating and guiding change. If more funding were available to those who promote, organize, and support change initiatives on a community-wide, regional, or national basis, their ability to support congregations in their processes could be strengthened significantly.

All of the factors cited above—building strong relationships, attending to the human dimensions of change, involving and providing support

for those on the front lines, structuring learning into the process, and providing adequate financial resources—can help to remove some of the stumbling blocks on the path toward change. Still, there are no magic bullets. Deep change is hard, time-consuming work that creates tensions that must be managed between the need for process and the desire for visible results. Change leaders must balance boldness and patience, persistence and urgency. As Aron and Zeldin (1996) assert, change agents must take the long view while navigating the short-term. They must acknowledge that successful change requires both action and analysis—enough time to root change, but not so much as to dissipate enthusiasm. This balancing act is more art than science and one of the most difficult skills for leaders to master.

### Obstacles to Change

Even with the best of intentions, readiness, and a shared vision, some change efforts fail. Aron and Zeldin (1996) suggest several reasons why change fails. In some cases, they note, those who advocated change had a vision of a future state, but little understanding of how to translate their ideas into concerted and effective action. In others, advocates of change didn't anticipate and were not prepared to handle the resistance they would encounter because of inertia, resignation, fear of the unknown, aversion to risk, and/or failure to communicate a compelling vision in concrete and accessible terms. Sometimes the decision to change was made by too small a group. At other times people's conception of change was too simplistic and mechanistic. (For example, it was assumed that change could be accomplished by telling people what to do; purchasing a new curriculum; sending people to a workshop to learn how to make change; and/or bringing in a new staff person.) Finally, they suggest that change can fail because an institution does not have enough resources (either human or material) to support the change.

In addition to these undermining factors, JESNA's evaluations and original research highlight two additional obstacles frequently encountered by congregations engaged in educational change processes: (a) the transiency of congregational school educators and (b) skepticism about the potential efficacy of any change efforts. High rates of turnover in supplementary Jewish education among both teachers and educational directors make it difficult to mount and sustain ambitious change endeavors. Even where turnover is not a factor, the reality that teaching in supplementary schools is primarily part-time work with meager compensation limits faculty investment and continuity. The situation becomes more problematic when the educational director is also a part-time employee (as appears to be increasingly the case, unfortunately, in response to the recent economic crisis). If, as noted above, a measure of congregational stability is a prerequisite for effective congregational change, then the transiency of educators (and of lay

leaders) and the limited time participants can devote to what is inherently a time-consuming process almost surely is detrimental to the change effort.

We began this article by noting that supplementary education has been subject for several decades to what have sometimes been withering critiques. Indeed, the very nature of the enterprise almost invites skepticism about its efficacy (Kraus, 2004). Wertheimer (2007b) perceptively suggests that the "supplementary" nature of congregational education sends a message to students (an often neglected group of stakeholders) about the limited importance of the enterprise, especially when the educational program is heavily focused on a one-time performance (i.e., when the purpose of congregational school is tied to *b'nai mitzvah*), as is still too often the case. He cites research findings and anecdotal evidence that graduates claim to have learned little in congregational school, found classes highly repetitious year to year, and generally felt little incentive to continue their Jewish education beyond age 13. These student attitudes affect parents as well, who sometimes reinforce the sense that "Hebrew school" is of secondary importance compared with other pursuits. As committed as congregational leaders and rabbis may be to creating a "better" program, that commitment may be tinged with some ambivalence about the perceived worth and feasibility of the effort. Leaders also may be genuinely confused about what direction to take, which educational goals to prioritize, and what types of changes are likely to produce positive outcomes and satisfied customers. Finally, the economic situation of synagogues and the axiomatic insistence that each congregation must operate its own educational program often result in programs that are under-resourced and under-populated, making the notion of substantial change seem like a pipedream, or simply irrelevant. All these factors combine to undercut the potential for embarking upon the kinds of change initiatives that are likely to prove effective, or, if such change is attempted, to create a climate in the congregation of skepticism, division, and half-hearted support.

### Impact of Effective Change in Congregational Education

In light of the difficulty of making change, it is not impertinent to ask whether the effort is worthwhile. Does the process of congregational educational change as it has developed over the past several decades produce positive results? We are just on the cusp of being able to answer this question with respect to the ultimate targets of the efforts: the learners, children, and their families. Even now, there is evidence that well-designed and implemented change processes can make a difference in other respects. Evaluations have documented changes in teaching and in leadership behaviors, as well as in congregational climates and in patterns of educational participation. All of these can be linked plausibly to better outcomes for students. Moreover, the broad impact of successful congregational education

change is seen not only in the congregational school, but also across the congregation and into the wider Jewish community. Relationship-building in the course of the change process has created shifts in communal culture. Change processes have generated heightened communal support for congregational education. In many cases, the change process led to noticeable improvement in relationships and communication patterns among local central agencies and the congregational schools.

Within the congregation and the school, change processes—especially those that are systemic in character—have shown evidence of improving professional and lay leaders' skills and effectiveness; increasing the skills and knowledge of classroom teachers; enhancing students' experiences in the classroom; and markedly increasing enthusiasm, energy, and pride among lay leaders and professionals. Additionally, changes and collaborative processes introduced through systemic congregational educational change have been incorporated into congregations' broader cultures and methods of operation (Woocher, Ross, & Woocher, 2007).

Two areas of change in particular—curricular change and professional development—have demonstrated significant impact on the congregational school as a whole and on individual teachers and learners. Curricular interventions have affected both the content of learning and teaching style. Implementing new curricula often necessitates that teachers develop new skills and take on new and different roles. For a curriculum to be utilized most effectively, it must be accessible to teachers at all levels of knowledge and experience, and also be relevant to students' lives. Because the efficacy of curricular reform depends upon ongoing support, including from peers, there is a critical need for buy-in. When key stakeholders are brought in early and engaged in a collaborative effort, curricular interventions can lead to observable changes in the quality of education. In addition, there is often a ripple effect from introduction of new curricula in the congregational school outward to the broader community of the congregation.

As a result of professional development interventions in the organizations and programs that JESNA evaluated and in the communities where JESNA has provided consulting services to facilitate congregational school change, teachers were more innovative and showed evidence of improved content knowledge and pedagogical skills. Professional development increased participants' credibility among their colleagues and constituents. Further, these programs provided valued support for problem-solving and reflective practice through mentorship. To achieve these benefits, professional development programs for congregational educators must overcome several barriers—including philosophical opposition, time constraints, insufficient resources, and lack of ongoing support and mentoring. These findings suggest that communities should capitalize on the positive culture created through professional development-focused change

initiatives by deliberately nurturing Communities of Practice (CoPs), mechanisms by which people who have a shared practice or area of focus (e.g., congregational school educators) can work together to build relationships and share resources and experiences that will enhance and/or improve their practice.

As noted throughout this article, these lessons learned are the fruit of independent program evaluations and primary research conducted by JESNA and others. Evaluation is, or should be, an important element in all change initiatives and is itself a contributor to successful change. The importance of systematized and ongoing evaluation is widely noted by scholars in the field of educational change. Senge (1994) states that "no learning can take place without continuous assessment" (p. 6). Among congregations and congregational schools, dedication to continuous program improvement can be demonstrated through commitment to evaluation and reflective practice. In a number of the initiatives that JESNA evaluated, congregations and/or their schools employed ongoing formative assessment and reflective practice aimed at guiding improvement. Evaluation introduced high levels of accountability to congregations and offered a model of responsible implementation for the entire community.

### Areas of Inquiry for Future Research

Significant progress already has been made in congregational educational change, but there is still plenty of room for further development (Kraus, 2008). We are continuously learning, growing, and changing; as are our congregations and congregational schools, our students and families, and our leaders and teachers.

*Transforming Congregational Education* (Lippman Kanfer Institute, 2008) includes a set of 10 questions that are suggested as "a learning and planning agenda for the next stages of the work of congregational educational change," though certainly not to the exclusion of others that might be posed. The ten questions are:

1. How can processes that are almost inevitably incremental in practice (even when guided by a "big vision") be a lever for fundamental and systemic change?
2. How do we balance (or synthesize) a desire to elevate congregations' sights, raise their standards for what constitutes "good" Jewish learning, and increase their accountability for performance (all necessary, perhaps, if Jewish learning is really to be satisfying and transformative for individuals) with a recognition of congregations' fundamental autonomy and their need to "own" whatever changes they make?
3. How can we more effectively incorporate learners' voices in the change processes?

4. Can we see today's initiatives—different as they are—as a collection of valid options for synagogues that are at different places in terms of their visions, histories, and capabilities?
5. How can the congregational educational change initiatives collaborate more effectively in general?
6. How can we help congregations take better advantage of additional modes and settings for Jewish learning?
7. Should these initiatives be helping synagogues rethink their educational roles to embrace “educational stewardship” more explicitly? Should the change initiatives put greater emphasis on encouraging/helping congregations to engage populations currently not being served?
8. How should congregational educational change initiatives relate themselves to non-synagogue providers of “complementary” education?
9. How do we develop the cadre of personnel needed to carry forward and expand the work of congregational educational change (both synagogue leadership and those who work with them)?
10. How do we enhance accountability, evaluation, and learning with respect to these initiatives?

In Deuteronomy 30 (verses 11–14), Moses confronts a weary people who have traveled far to reach the Promised Land. At times they have felt, individually and communally, as though they never will arrive despite their best efforts, their careful planning, and their investment in a transformational process designed to deliver them into a brighter future. In their hope and exhaustion, the Divine Word reaches their ears: “The commandment which I command you this day, it is not too hard for you, neither is it far off. . . . The word is very close to you, in your mouth and in your heart that you may do it.”

The road to systemic, transformative congregational educational change is long and hard. But there is great promise at the end of the journey if we commit sufficient resources and use them wisely. We have a good sense of what is possible and of what is needed to get there. The change principles and intervention strategies laid out in this article have the potential to produce the transformative change that is needed to put behind us once and for all the disparagement and skepticism and to make our synagogues places of rich and joyful learning that makes a meaningful impact on the hundreds of thousands of children and adults who come in search of Jewish education.

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## Deep Change in Congregational Education

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*The Re-Imagine Project (of the Experiment in Congregational Education) is an attempt to engender innovation in congregational schools. A long-term study of 24 participating congregations in Greater New York examined the extent to which the effort yielded new models of education (radical change). The study included surveys of task force members and interviews with 101 key informants. Results show four patterns of change: radical, replacement of old forms with new forms, creation of alternatives, and addition of programs. Factors related to starting points, the change process, and resources were found to influence which synagogues achieved deeper levels of change.*

### CONTEXT OF THE INQUIRY

Congregational education has for decades labored under the traditional religious school model. Based on Sunday and/or afterschool classroom teaching, the model has increasingly come to be seen as problematic and in need of fundamental revision (Wertheimer, 2007). There may be debate over causes and solutions, but what's clear is that most supplementary schools fail to captivate the affection of parents or the imagination of their children. Ten years ago the Task Force on Congregational and Communal Jewish Education concluded that innovative initiatives were needed to revitalize and enhance the quality of Jewish education and they recommended a set

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of activities to foster new models and structures in program design and content (Flexner, 2000). Almost a decade later, a study of effective supplementary schools arrived at essentially the same conclusion (Wertheimer, 2009). The repeated call is for *innovation*.

The Re-Imagine Project of the Experiment in Congregational Education (ECE) is one of several current efforts to engender educational innovation. As its name suggests, it intends to produce original thinking about supplementary school education and to create a new mindset about Jewish learning. Its goals, among others, are to explore and experiment with alternative models for religious school education and to build the capacity for organization change. Its design is a two-phase process: a year and a half of visioning, planning, and pilot testing followed by the implementation of a full-scale educational initiative. Our research focuses on the implementation phase and is concerned with the extent to which deep change is evidenced in the congregational schools as a result of this effort.

### The Change Initiative

With funding from UJA-Federation of New York, The Re-Imagine Project has involved 32 congregations in Greater New York since 2003. The work has been carried out in three cohorts. The first launched in 2003 (5 synagogues), the second in 2004 (14 synagogues), and the third in 2006 (13 synagogues).

#### PLANNING PHASE

Each cohort began with an 18-month planning phase. Within each synagogue, this phase was driven by a task force selected to represent different constituencies (lay leaders, parents of school children, educator, rabbi, and others). The task force used a step-by-step guidebook that took them through a deliberate process based on Jewish text, planning models, and organizational commonsense. The intended outcomes of the planning phase were an articulated vision for Jewish education for the children of the congregation, pilot tests of potential innovations, and clear direction for the implementation of a full-scale educational initiative.

Previous research gathered baseline data on the religious schools in the second and third cohorts and assessed the success of the planning phase in the second cohort only (Sales & Koren, 2007a, 2007b). This latter study measured how much congregations accomplished in the year and a half of planning and how positively they evaluated the product of their efforts. It also examined the factors that contributed to or detracted from a satisfying process and outcomes. The study was based on a pre- and post-project survey of task force members and a post-project survey of members of the

school committee and the congregation's board of trustees. The research found that in the year and a half of planning, most of the congregations did not re-imagine their religious schools. Overall, only 4 of the 14 congregations reported that they "very much" re-imagined the school and only two said that their work set religious school education in a new direction. Part of the explanation lay in the relatively low ratings given to task force creativity and willingness to think big and take risks. Part lay in the enormity of the task and the necessity in a number of the sites to focus their efforts, to start small, to see this work as first steps on a longer process of change. And part of the problem, we suspected, was the intractability of religious school structures.

Nonetheless, results showed that task force members learned a great deal about their religious school, models of education, and the relevance of Jewish text. On a personal level, they learned about others in the congregation and about themselves and their own leadership capabilities. For many, the project helped develop skills in meeting management, community building, planning, and the like. Most importantly perhaps, survey respondents exhibited substantial acquired wisdom about the change process. It is this learning that we hypothesized would have the greatest impact on the congregations in the future.

#### IMPLEMENTATION PHASE

The planning phase was followed by an implementation phase in which the synagogues were to put into place a full-scale educational initiative. The current research, conducted in 2009, focused on the implementation phase. Depending on their cohort, synagogues had had between 1 and 4 years to develop their initiatives by the time of data gathering.

#### Research Focus

The research on implementation is framed by ECE's goal for the congregations not merely to develop new programs in their religious schools but to create new models of education. The core question concerned the extent to which congregations achieved the deeper level of change entailed in a new model of education.

#### THEORY OF CHANGE

Religious schools, like any organization, have deep and surface structures. Surface structures are the concrete elements readily seen in an organization. A *program* is a surface structure. It is defined by target audience, content, learning activities, and the practical matters of time and place.

In contrast, deep structures are intangible. They are the "heart and soul" of the organization and touch on its culture, values, and beliefs. A *model* is deep structure. It entails a set of deep-seated assumptions about education and beliefs about student learning and the role of teachers and parents in the educational enterprise.

Surface- and deep-level change have variously been referred to in the literature as incremental and deep change, first- and second-order change, or structural and fundamental change. Such designations acknowledge that different types of change have different degrees of magnitude, with deeper levels of change having greater implications for faculty, students, parents, and other stakeholders (Beckard & Pritchard, 1992; Fullan, 1993; Waters, Marzano, & McNulty, 2004, 2005). Waters et al. (2004), for example, explain first-order changes as those built on past or existing models. These relatively superficial changes "are consistent with stakeholders' prevailing values and norms and can be implemented largely with existing knowledge and skills and with help from outside experts. In short, they merely tinker at the edges and don't seek to change the core values, beliefs, or structures of the school" (pp. 50–51). In contrast, second-order changes "dramatically break with the past and challenge existing models, norms, and values." These relatively deeper changes cannot be implemented by outside experts. Rather, "stakeholders must find their way through the changes together, acquiring along the way new sets of knowledge, skills, ways of thinking, and often, values" (p. 51). It is commonly recognized in education circles that many problems cannot be solved "once and for all" by superficial, incremental change but rather require deeper, more radical shifts in thinking and behavior (Fritz, 1984; Fullan, 2001; Heifetz, 1994). ECE's purpose is to bring a similar understanding to the problems of Jewish supplementary education.

The two levels of change can also be understood through the theory of single- and double-loop learning (Argyris & Schon, 1978). In single-loop learning, the organization attempts to solve a problem by using tried-and-true strategies. In double-loop learning, the organization re-conceptualizes the problem, shifts its view of the world, and adopts a fundamentally new strategy. In terms of ECE's Re-Imagine Project, changing a program by adding new elements or adjusting the schedule is single-loop learning; re-imaging congregational learning, conceptualizing a new model of education, is double-loop learning. Importantly, organizations that master double-loop learning will be more successful in the long run as they not only solve today's problem but also learn how to solve problems. In terms of Jewish education, congregations that engage in double-loop learning not only develop new programs but they learn how to become educational innovators. We can expect that over the long haul, these synagogues will be more adaptive and creative places than those that merely learn how to implement a particular new program.

## PROCESS OF CHANGE

ECE's theory of change intends to produce deep-level change in the culture of the congregation, its educational model, and its capacity to be an innovating organization. The change process is based on the premise that the recipients of change must be actively involved in the process and should "experience a taste of the final product." It also recognizes that change takes a long time and requires patience (Aron, 2000).

ECE's Re-Imagine change process is driven by a task force selected to represent the different constituencies within the congregation and follows a multiple-stage design. It begins with the formation of the task force and related structures (e.g., leadership team, connections to the religious school committee) and the establishment of the task force's working style (e.g., facilitated meetings, time for reflection, text study). The task force then researches the history of the religious school and its current status; considers the characteristics of meaningful Jewish learning; and challenges current assumptions about Jewish education for children in the congregation. In the third step, the task force becomes acquainted with several alternative models for Jewish education and begins to consider its own religious school program in light of these models. It also considers four issues: the integration of Jewish learning and living, the role of community and of parental involvement in children's Jewish education, and the creation of Jewish memories. Note that these issues define the *educational philosophy* underlying the project.

In the next step, the task force members examine their congregation's challenges and opportunities; they take a comprehensive look at their school; and they consider future possibilities through the lens of the four issues referenced above. The last step in planning engages the task force in writing a vision statement, developing and assessing proposals for educational initiatives, designing a pilot program and developing a plan for its implementation. After running the pilot, the congregation moves to the implementation of a full initiative. The assumption is that this extended process of exploration, reflection, visioning, and testing changes not only the educational delivery system but also the values and philosophy that underlie Jewish education for children and parents in the congregation.

## METHOD

The implementation study is based on 24 of the original 32 synagogues that participated in The Re-Imagine Project. Synagogues that failed to complete the planning phase or were on hiatus from the project were not included in the study. Findings therefore represent the experience of the

most stable and/or resilient synagogues and, in some regards, present the most optimistic picture of the kind of change that is possible. Beyond that, the synagogues in the study are diverse in terms of the key variables of location, denomination, size, and culture.

The participating congregations are located throughout the New York metropolitan area: five are in Manhattan, three in Queens, one in Brooklyn, seven in Westchester, and eight on Long Island. Importantly, some of them are in intensely Jewish areas which means that there is not only a large Jewish population but also high levels of competition from other synagogues and groups. Others are in areas remote from centers of Jewish life, often facing the challenges of a declining Jewish population base.

These congregations cover much of the denominational spectrum (Table 1). Orthodox congregations are not included in the project as they tend not to have supplementary school programs given their membership's high rate of day school participation.

The smallest congregation has 38 member households, while the largest claims more than 1,800 households (Table 2). There is commensurately a large range in the size of the religious schools. At one end of the spectrum is a large congregation with 600 students and 55 faculty members in its religious school. At the other end are two congregations with religious school enrollments of 25 students and a faculty comprised of only three or four teachers. At issue is not just size but also growth trajectory. One, for example, has been undergoing rapid growth in membership in recent years. The intimacy which was a key quality to its founding generation is now of concern as they plan for the future. Another has seen almost a 20% decline in membership and a 32% decline in its school enrollments. It is equally concerned with numbers but the impact on its planning is obviously very different.

**TABLE 1.** Congregational affiliation.

	Number of congregations
Conservative	11
Reconstructionist	3
Reform	8
Unaffiliated	2

**TABLE 2.** Congregation size.

Total households	Number of congregations
Fewer than 300 households	5
300-499 households	8
500-999 households	8
1,000 or more households	3

Finally, the congregations have distinctive cultures. One is described as traditionalist; another as participatory and innovation-oriented. Some are decentralized; others are run in hierarchical top-down fashion by a strong professional team. These cultures are implicated in the effort to change the school. For example, one of the congregations describes itself as a "sensitive, mindful community." When it began the project, it already possessed a vision and the ability to think about Jewish practice creatively and with sophistication. In contrast, another is described as averse to change, an attitude prevalent on the board and among the broader membership. The former congregation, as described below, achieved deep structure change within the time frame of this study. The latter did not.

Data gathering entailed hour-long telephone interviews with key informants involved with each of the congregations. At least three people were interviewed at each site. These included the ECE consultants, rabbis, educators, other professionals, and lay leaders (including members of the original task force). All total, 101 individuals were interviewed (69 in one-on-one interviews; the others in group interviews). Interviews were either recorded and transcribed in full or captured in detailed notes. The interview protocol covered the model of education; progress with implementation; learning from implementation; related initiatives, grants, or programs in the synagogue; and future plans.

A case story was developed for each congregation drawing not only on interview data but also on results from our studies of the planning phase. The analysis herein follows from these stories and seeks to draw out general lessons from the particulars.

## KEY FINDINGS

The research found four patterns of change: deep change, replacement of old forms with new ones, creation of alternatives, and addition of programs. The distribution across these patterns is flat with five or six congregations manifesting each type. In addition three congregations evidence no change to date.

### Deep Change

Five of the congregations give evidence of change that is reaching their deep structure. These are congregations that are not merely developing new programs but also new models of education. One exemplar is a Conservative congregation that over the past 3 years reported "very high" levels of innovation. At the programmatic level, the task force implemented a pilot consisting of three programs—on Shabbat morning, on Friday night, and for

Havdallah—each with family learning, a ritual component, and a meal. Sunday programs were changed from classroom teaching to informal Jewish education and family learning experiences. The school introduced more experiential learning during the week, as well. For example, instead of having students sit at their desks and study prayers from the siddur, the school developed choices that allow students to learn prayer musically with instruments or to explore the meaning of prayer through art projects. In terms of structure, the school moved from 3 days a week (6 hours total) to 2 days a week (5 hours total) plus semimonthly mandatory Shabbat programs and a social action project. As well, the synagogue integrated all aspects of congregational learning under the auspices of a Director of Lifelong Learning. At the symbolic level, this restructuring signaled a paradigm shift from a top-down approach to one responsive to the needs of all members. Moreover, the extra hour of teacher time produced by the schedule change was set aside for weekly professional development. Sum total, these changes yielded significant family involvement in Jewish education, opportunities for experiential learning, and a strong emphasis on professional development. Importantly, after the pilot year, the new program became the only option for religious school education. The change was not just for those who opted in but for everyone, thus increasing the likelihood that it would seep into the DNA of the congregation.

### Replacements

Seven of the congregations replaced existing schedules and/or curricula with new forms but have not yet achieved the depth of change noted above. Replacement means that the old form no longer exists and that families and children have no choice but to participate in the new program. Two of these congregations reduced the school's schedule from 3 to 2 days a week. One was able to make the change for the entire school and, indeed, it became a starting point for curricular changes as well (e.g., introduction of more experiential learning, more choice). The other found the reduction of days to be a contentious, divisive issue amongst parents and to date has been able to implement it in only one grade.

One congregation left its schedule intact but replaced its old curriculum with a new one. The new program covers eight Sundays a year in which parents and children attend separate classes and then engage in a joint activity. The focus of the program is on the Jewish holidays and the goal is to increase parents' awareness of the rituals associated with various holidays so that they can include them in their home practice. Another congregation integrated its youth group with the religious school. Once a month, "youth group day" replaces a regular weekday class. This day is marked by informal educational activities (e.g., a scavenger hunt, quiz show, or mitzvah project) followed by dinner.



Other congregations replaced both their schedule and their curriculum. Here is one example: During the winter months, a small Reform congregation replaced 5 consecutive weeks of its regular Sunday morning program with a Shabbat morning program that includes parallel learning for children and parents, fourth through seventh grades, and then participation in Shabbat morning services. The first year the topic of the program was aging. While the children learned with their regular teachers and classmates, the parents learned with the rabbi and a group of adult congregants who come on Shabbat morning for Torah study. In the final week, students and parents met at a local assisted living facility where they engaged in an hour of study, a Shabbat morning service, and lunch with the residents.

### Alternatives

Five congregations implemented either schedule and/or curricular changes that were *optional*, most often trading off mid-week classes for Saturday or Sunday programming. One congregation, for example, offered a Sunday morning option instead of a weekday class. Although a minor change, leaders believe it could eventually make way for more significant change as Sunday morning sessions open the possibility for parent-child learning.

### Additions

Four of the congregations added programs. One congregation, for example, added a Saturday morning program which includes interactive family prayer, learning, and socializing. The program was an optional addition to the regular religious school program. (N.B. The program was eventually made mandatory, but the requirement did not increase enrollment and the program effectively continues as an option.) The congregation also developed a four-times-a-year Sunday program, open to the entire congregation, which incorporates learning about the holidays and social action. Other congregations experimented with events, junior congregation lunch and learn, parent-child learning sessions, special Shabbat programs, *havurot* for school parents organized by grade. All of these take place episodically and generally target specific grades. By adding experiential learning, parent participation, and original content, they intend to enrich the religious school program.

### No Change

Three of the 24 congregations in the study evidence no change in their Jewish education. The outcome from one is a social action committee which serves no direct educational function. The outcome from a second is a lifelong learning committee and a new educational professional who

has been able to generate more programming (e.g., a synagogue-wide Hanukkah celebration). The programs are normative for a congregation and although they may represent more activity, they do not rise to the level of innovation. A third wants to reverse the negative views of the Hebrew school and create a "fun and innovative" place for children, but has not as yet taken any action on its vision.

### Attendant Change

Importantly, what is salient for synagogue leadership is most commonly not the new educational model or programs but rather the changes that occurred in the attempt to create these. Across the board, leaders spoke of the friendships and sense of community that developed among participants on the task force and in the pilot programs. This sense of community has noticeable ripple effects: new leadership; increased connection to the synagogue and the religious school; higher attendance at youth group programs, family programs, and worship services; greater cohesion in the classroom. One synagogue noted that one of the tables at a recent fundraising event was filled by families from the Re-Imagine pilot program. Another noted that the higher levels of parental involvement meant that the professionals could now have conversations with parents about engaging students in learning, creating compelling community, and raising the level of content. This is different, one informant said, than talking about how to supervise the parking lot during dismissal. Although direction of causality cannot be empirically established (i.e., whether the program attracted the more participatory or whether it made them that way), from the congregations' point of view, these changes are a valued result of the initiative.

### IMPLICATIONS

How do we understand these vastly different results among the 24 congregations? All of them were given the same opportunity when they joined The Re-Imagine Project. They received the same materials and were instructed and consulted in the same process of planning and implementing change. The initiative made no judgments but set the same expectations for all of them. It appears that a confluence of factors in certain sites led not just to more programming but to a new model of education. We consider here three types of factors: those related to starting points, the dynamics of change, and resources. In order to understand the impact of these factors, we looked at the role they played in the highest and lowest performing sites. Highest performing sites include those that arrived at deep-level change. Lowest performing sites are those that show little or no change to date.

## Starting Points

### COHORT

Our first assumption was the synagogues in the earlier cohorts would have greater outcomes because they had had more time in which to effect change in their religious school. The correlation between cohort and outcomes, however, is imperfect: Deep change is found in at least one congregation in each of the three cohorts; and no change is seen in at least two congregations in Cohorts 2 and 3. Rather, what correlates with implementation outcomes is preparedness and the pace at which the task force proceeded through the planning phase. All three congregations from Cohort 2 that achieved deep change had successfully "re-imagined" their religious school by the end of the planning phase (as per task force survey responses at the time). None of the others in that cohort had. In fact, one of the lowest achieving congregations in this cohort is only now finding what might be the right educational model for them. They were slow to gain momentum in their planning, learn from their pilot program, understand their failures, and to figure out what they were looking for in congregational education. The starting date of the project seems less relevant than the capacity of the organization to arrive at a vision and to generate creative ideas for fulfilling it.

By the third cohort, the project had been strengthened and improved but it was reaching congregations at lower levels of preparedness. As per survey results, Cohort 3 task force members were significantly *more* likely than their counterparts in the previous cohort to understand the process and intended outcomes of the project and to have clear ideas about quality Jewish education. At the same time, they were significantly *less* likely to believe that their congregation was truly ready for the project or that the project was a very good match for the congregation. Although they equally judged their task force to have the right mix of people and the leadership it needed, they less often said that the group was willing to think big and take risks. As well, compared with the previous cohort, fewer of the Cohort 3 task forces believed that the project had the active support of the synagogue board and the school committee. Years later, only 1 of 12 congregations in Cohort 3 had made deep change versus 3 of the 9 congregations in Cohort 2. It seems, therefore, that preparedness at the outset has an influence on implementation outcomes.

### GOALS

Many congregations came into The Re-Imagine Project seeking deep change in the religious school, others were looking for more superficial change in the school, and some joined the project hoping for congregation-wide change. Our second assumption was that a congregation's outcomes would align with its beliefs about what the project could/should help it accomplish.

About one third of the congregations in the study evidenced a grasp of what it means to have a model of Jewish education and a desire to change the current model. Their leaders had an articulated view of what was going on with education in the congregation, a philosophy of education, or an understanding of pedagogy. They joined The Re-Imagine Project to make a change in this deep structure. Most of the congregations that produced deep change are in this category. For example, at a Reform congregational school that was on the move with a number of initiatives, leaders spoke clearly about the "traditional" model of Jewish education in which a certain number of instructional hours or classroom days are assumed; parents are rarely present in the school; and when parents are there, it is to watch their children perform rather than to participate actively in their education. The leaders in this congregation understood that they needed to "push" on this model in order to, in their words, modernize it, upgrade it, and raise its quality. The goal was a new model that would emphasize informal education, parental engagement, and lifelong learning. The philosophy of Jewish education, or the big idea that underlay their work, was that parents and children learn side-by-side in the synagogue, the learning is brought into the home, and it is then translated into action in daily life. Note that this conversation does not specify a particular program but rather opens the gates to an endless possibility of structures, programs, experiences, events, and various experiments in education.

Based on programmatic designs offered by The Re-Imagine Project, a number of the congregations created a Shabbat program in lieu of weekday classes. In some places this was a surface-level change, a manipulation of the schedule to entice more families into the synagogue. But more often, it was an effort at deep-level change, an attempt to create a Shabbat morning culture in the congregation, to build a community in which religious school families were fully integrated into the life of the congregation, and to provide opportunities to live and learn in "real Jewish time." These efforts invariably affected not only the religious school—which was the starting point for innovation—but the larger congregation. They also produced what Loren Mead (1995) refers to as "maturational growth"—increased sense of community and greater capacity for worship, the essential obligations of the religious institution.

A few of the congregations were seeking surface-level change. One congregation, for example, believed its traditional religious school model was successful and wanted to preserve and enhance it without fundamentally changing it. Another school was also well-satisfied with its existing model and wanted the project to support it by bringing families together for study and prayer and by creating Jewish memories. A third school was already working on increasing parental involvement and saw the work of the initiative as continuous with efforts to date.

Several of the congregations wanted to focus on the congregation overall and not specifically on the religious school. At one, the religious

school was viewed as an "add on" rather than an integral part of the congregation. The task force thus believed that their Re-Imagine innovation should not take place solely within the school, but should reach across generations to the entire congregation. Another congregation reached the same conclusion but for somewhat different reasons. This congregation had a shrinking religious school in deficit. The congregation, too, was declining in numbers and only a small percentage of households had children in the school. Concerned that the small school was consuming too many of the synagogue's resources, the congregation used the initiative to reach the congregation more broadly and to design intergenerational programming. The goal of a third congregation was to move beyond its Classical Reform roots in order to make Reform Judaism fresh, alive, and meaningful for congregants. It used the initiative to craft a broad new vision and a set of pilot projects that encompassed not only the religious school but also adult education, worship, and social action programming.

By and large, implementation outcomes are in line with these initial orientations toward the project. Those that have achieved little or nothing came into the project seeking superficial change or change so broad that the process was unable to support it. For example, one synagogue wanted to use Re-Imagine to build a sense of community across the different groups in the congregation. Given that the Re-Imagine materials did not lend themselves well to this goal, the task force was unable to push change with its vision statement or its pilots. It did manage to establish a lay committee for its religious school and to generate more interest in social action, but it did not try and therefore did not succeed in developing new educational models.

Those that have achieved the greatest change most often came into the program with an intent to create deep-structure change. But there are instructive exceptions. One congregation joined The Re-Imagine Project seeking help with reducing the religious school from 3 to 2 days a week. Although originally focused on schedule, their efforts ended up changing the school and affecting the culture of the congregation. (The process by which this happened is described below.) Another began the project wanting to innovate within the congregation at large. In other sites such a goal was problematic, but here educational leaders linked the effort to make Shabbat celebrations the cornerstone of the congregational community with curricular innovations in the school. The changes were mutually enhancing, bringing greater energy to both the school and Shabbat morning practice.

### Dynamics of Change

Implementation outcomes are also influenced by the dynamics of change in three ways: change begets change, process begets change, and politics can limit change.

## CHANGE BEGETS CHANGE

Greater outcomes result in congregations that initiate more than one innovation. Change is particularly wide and deep when each innovation spurs others, leading to a chain reaction of change. One of the large Conservative synagogues is an object lesson. The congregation began its re-imagining process with the school but ended up with change at the congregational level and the beginnings of a shift in culture. Here is the story in brief: This is a traditional congregation which holds Shabbat observance at the core of its identity and practice. Many families send their children to day school and the rabbi emphasizes the importance of a day school education. At the start of The Re-Imagine Project, the religious school families felt on the periphery of congregational life, seeing the synagogue as a "closed society" for knowledgeable and observant members.

The first innovation was a well-studied change in the religious school schedule: It reduced the number of days from 3 to 2 but maintained the number of contact hours and the school's high standards. The change meant that students were in school for longer periods of time each day, so the teachers needed to adjust their lesson plans. They looked to informal learning models and expanded the curriculum to include electives and more hands-on learning including music, art, drama, and cooking. The congregation took part in ECE's professional development program, which in turn made professional learning an ongoing part of the school. As part of his involvement in the task force, the rabbi started office hours for the religious school parents and expanded his teaching in the school. Other efforts to engage religious school families led to an Israel trip for them, along with the rabbi and educator and their families. The trip did much to change both parents' and students' relationship with the rabbi as well as their involvement in the synagogue. It also strengthened the bond among the families who continue to socialize and participate in congregational life together. All of these efforts integrated the families into the mainstream of the synagogue and brought them into leadership positions beyond the religious school. At the same time, the congregation created a family learners' minyan as a Shabbat morning entry point for the religious school families. And then, building on the success of the learners' minyan, they created a Shabbat morning program for second- and third-grade families. An at-home component to the Shabbat program soon followed.

The result of the multiple efforts and the chain reaction among them profoundly changed the congregation. The congregation learned to listen to and understand its congregants beyond the committed core. The rabbi became active in the religious school community and, in turn, religious school families became more involved in congregational life and leadership. Today, more religious school families attend Shabbat services than previously, a sign that families are now more comfortable in the core of

synagogue life. All of these are signs of a change in the deep structure of the congregational community.

The synagogue above and several others that saw success with the initiative coupled their change efforts with professional development. Professional development is particularly important in settings in which new curricula are being implemented (Sales, Samuel, & Koren, 2007). Teachers need to learn the new material and its methods, but they also need to learn the new ways of thinking about teaching and learning that underlie the new curriculum. For example, one of the highest outcome congregations introduced experiential education into its curriculum. In doing so, it provided professional development to religious school teachers unaccustomed to this mode of teaching and brought them to a summer camp to observe best practices. Another of the top performing sites introduced family education. It held in-service training for teachers not only to introduce the new model of parent-child learning but to empower teachers to become partners in developing the program. Unless teachers have bought into the new program and are comfortable with their new roles, any change in structure or curriculum remains superficial.

#### PROCESS BEGETS CHANGE

Evidence abounds that the Re-Imagine process itself creates change beyond the particular innovation. Informants variously reported that the project readied the synagogue for innovation and infused the congregation (beyond the religious school) with a sense of change. It introduced the concepts of long-term strategy and vision—both of which were readily applied outside of the religious school. Moreover, the Re-Imagine Project engaged the task forces in the study of Jewish text, a practice that carried over to the meetings of other groups within the synagogues. In one Reform congregation, text study, once seen as foreign and Orthodox, became more accepted as a result. The rabbi now often talks about the weekly Torah portion and does a text study instead of a sermon on Friday night. The project taught them the value of getting broad congregational input before implementing change, and the importance of engaging lay volunteers rather than relying solely on professional staff in important endeavors. Not all of the task forces enjoyed the Re-Imagine planning stage, but even those critical of the process credit it with important learning.

It is also clear from the data that change initiatives, regardless of their focus, prepare the synagogue for more such work. One congregation that was previously in Synagogue 2000 describes that process as the “spark” that convinced them that they could look at their congregation with fresh eyes. It also prepared the member who would head the Re-Imagine task force for her leadership role. Even congregations that had learned a negative lesson

from Synagogue 2000 (a great deal of effort for little measurable output) used that learning to good effect when it came to Re-Imagine, the next change initiative.

Importantly, the changes emerging from the process itself cut across all cohorts and all levels of outcomes—from those that created radical change in the congregation to those we would judge as having produced no change in their educational model.

#### POLITICS AND CHANGE

We had expected that congregational politics would emerge as a key variable distinguishing the highest from the lowest achieving sites. We found, however, only a few instances in which political struggles affected the capacity of the organization to innovate. In one synagogue, the top leadership morphed the Re-Imagine task force into an education board to replace the traditional religious school committee. When the new education board began to implement change, it met the resistance of some who accused it of wielding too much power. Another congregation set up parallel governance structures—the traditional religious school committee to set policy for the traditional school model and the Re-Imagine task force to create new policies and programs for the optional innovation model. Lay leaders on the former committee felt “bypassed” by the new structure and the task force had to proceed gingerly to avoid challenging the authority of the existing committees. In yet another synagogue, task force members were, by design, not the “usual players” in the synagogue. Some of the old guard leadership resented this fact, seeing the task force as exclusive and intrusive, and sensing that they were being left behind.

All three congregations confronting power issues managed to produce notable but superficial change in their religious schools. It appears that organizational politics can slow down or limit change but it does not stop it.

#### Resources

Change depended on having the human resources to start the change process and the financial resources to maintain its momentum.

#### HUMAN RESOURCES

During the time of the project, there was substantial turnover among synagogue professionals (rabbis, education directors, principals) and a number of new hires. New hires not only replaced staff who had left but also brought family educators, program coordinators, or curriculum developers



into some sites. The change in personnel sometimes obstructed progress with innovation. In other instances, it is credited with making greater change possible.

On the negative side, transition is disruptive. During the planning phase of the project, one of the slowest sites faced turnover among clergy and educational staff. Not only were the lay leaders loath to take action before the new senior rabbi arrived, but energy that could have gone into innovation was going into professional staff search and transition. It also stymied the lay leaders who needed professional guidance. With one or more staff positions unfilled, the remaining professionals had increased workloads that made it impossible for them to attend to long-term planning and change. Two other congregations that hired new educational staff made changes that they attribute to their new leadership and not to the initiative. Indeed, in one case, the new education director took them in a direction that obviated their need to continue along the Re-Imagine path.

On the positive side are several congregations in which newly hired education directors and/or rabbis were able to push innovation forward and make a difference in their Re-Imagine accomplishments. In four instances, the new director was chosen for his/her past experience with school change efforts. In one case, for example, the new leader is credited with bringing new enthusiasm for the pilot Shabbat program and for integrating it into the religious school curriculum by requiring teachers to develop relevant materials and activities for their classrooms, something the previous director would not do and the lay leaders could not do. In other successful instances, new professionals were hired to coordinate the new programs and thus provided the leadership and human resources for their growth and development.

The involvement of the lay leaders was inconsistent over time and across sites. Most commonly after the planning phase, lay leadership lost momentum, dwindled, or morphed into new governance entities with new membership. The research found no consistent pattern between the role of lay leadership in implementation and the depth of change. What seems critical is lay leadership's *support* for the change work and not necessarily their active involvement in it.

In any event, innovation cannot proceed without sufficient human resources to drive it. One of the sites that produced no change is a small congregation in which many members of the task force also held other roles in the congregation. When there was turnover in the educational and rabbinic leadership, lay leaders on the task force took over the work, a move that contributed to a high burnout rate. Several task force members joined the search committee for the new rabbi and the task force folded before a pilot was conceived. At the very least we can conclude that a minimum foundation of human resources is needed in order to succeed with a change initiative.

Finally, lay leadership may be implicated in the ripple effects of change, the conduit by which change (or the appreciation for change) moves from the religious school into the congregation more broadly. It was not uncommon for leaders to be developed on the Re-Imagine task force and then appointed to other positions in the synagogue. In one congregation, over one third of the current board, including three officers, are former Re-Imagine task force members. These volunteers bring their Re-Imagine perspective into synagogue planning. That perspective includes the notion that vision is essential and that change is possible.

#### FINANCIAL RESOURCES

Change requires financial resources and the difference is apparent between the congregations that managed to bring in outside resources and those that did not. Not surprisingly, all of the most successful congregations received Legacy Heritage grants and only one of the least successful congregations did. (In this latter case, the grant came too early in the pilot phase. The congregation was burdened by the requirements of the grant; the pilot failed; and no further funding was forthcoming.) It is likely that success is both the cause and the outcome of outside funding. Success seems to beget success: The congregations most capable of change are the ones most likely to be funded for innovation. It is also the case that the funding, in turn, contributed to their success.

Of the 24 congregations, 9 received innovation grants from Legacy Heritage and 4 others secured funds from other sources (Jewish federation, private donors, congregational funds). These monies were variously used to create curricula and materials, support and expand programming, and to hire staff that could work in the new mode. It is this latter purpose which, as described above, may have had the greatest impact on the growth of the initiative. One of the most successful congregations received a grant in multiple years. It thus had the funds to hire educators and implement programs beyond the limitations of the congregation's budget. The synagogue expanded programs every year to meet the updated requirements of the grants. It is clear here that the resources provided by outside funding accelerated the pace of change and the creation of new programming. Another synagogue has a special congregational fund for innovation. Both of their pilots, which were optional additions to the traditional model, received significant support from this fund. Without the support it would have been difficult for the synagogue to assume the additional costs associated with running an alternative option alongside the traditional religious school, particularly in the current economic climate.

Where funding was not received or not continued in succeeding years, progress was stymied or stopped. One of the congregations had an idea

for radical restructuring of the entire congregation but needed full-time staff to take it to implementation. They applied for but did not receive grants for this purpose and the plan is now on hold. Another received a grant for the first year of their pilot but not for the second year. Not only was the congregation disappointed, but progress was slowed markedly. Still another received initial support from a donor that enabled them to add electives to their religious school program. The past year was financially difficult for the congregation and it appears that electives, the cost of which they do not want to pass on to the parents, will have to be offered every other year unless they can find a donor to underwrite them. Leadership here truly believes that the major impediment to fulfilling the overall vision of the initiative was financial. The task force was asked to think big, not to be concerned with budget, to start to dream and believe. That is precisely what they did but, in reality, they did not have the financial or personnel resources to make it happen.

### CONCLUSION

The research confirms that a thoughtful and concerted effort can effect change in congregational education (Weinberg & Aron, 2002). Two out of three congregations that began the Re-Imagine Project achieved noticeable change in their program's structure, content, and/or approach. Rarer, however, is the capacity of the synagogues to arrive at new models of education—to introduce new modes of thinking about education, to change the culture of the school, and to create not just a new program but an innovating congregation in which education will continue to grow and evolve in exciting ways.

This more radical type of change appears to be linked to the capacity of the task force to move apace through the planning phase, creating a vision and generating creative options for innovation. The group's initial ability to think big and take risks continues to have an impact on the congregation's innovation during the implementation phase. Radical change is also helped by an understanding of the difference between a new program and a new model, a difference that some congregations appeared not to grasp. Synagogues that were interested in changing the deep structure of the school were more likely to achieve such change than those that were focused on surface-level changes.

The impact that participation on the task force or in Re-Imagine pilot programs had on individuals helped to generate further change and to increase the likelihood that change would get to the deep level. One common impact was an increased sense of community, which in turn raised levels of participation and started, in some instances, a virtuous spiral

of positive change in the school and in the wider congregation. Another was the cultivation of new leadership which in turn brought new ways of thinking to the synagogue board and other committees.

The most energy and dynamism was seen in congregations that tried a variety of innovations. It is unlikely that any one change can be deep or broad enough to affect the whole educational system. As Wertheimer (2009) notes, schools are complex institutions and require a series of interventions to turn them around. The value of multiple interventions is that each successful innovation spawned others (e.g., a change in the schedule provoked a change in the curriculum; a change in family education led to a change in Shabbat morning services). As change bred more change, the momentum of innovation quickened. If and where this process is sustained, it is likely to lead to the kind of deep change that the field is seeking.

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